

INSTALLATION INSTRUCTIONS



TrialDirector 360[®]

Notices

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Workflow: Install TrialDirector 360

Applies To: TrialDirector 360

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[1. Log in to the TrialDirector 360 Website](#)

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This topic contains high-level procedures to help you log in to TrialDirector 360 for the first time, activate your account, download the TrialDirector 360 client, and install the TrialDirector 360 client.

The following illustration shows the basic process outline. The numbers correspond to the procedures later in this topic.



Before you Begin

When you purchase TrialDirector 360, you will be sent an email containing your user name and temporary password for your TrialDirector 360 account.

TrialDirector 360[®]

Welcome!

We are excited to have you as part of the TrialDirector 360 Team and we look forward to working with you to get the most out of it.

Please download and read the installation instructions before continuing.

Download
Installation Instructions

TrialDirector 360 Account Information:

You can now access your TrialDirector 360 account with the following credentials.

URL: www.trialdirector.com
Username: anna
Password: 68#A2JPI2178492

Once you have logged in to TrialDirector 360 and activated your account, you can reset your password.

Need help getting started?

Here are a few great resources to help you get started.

Video Tutorials

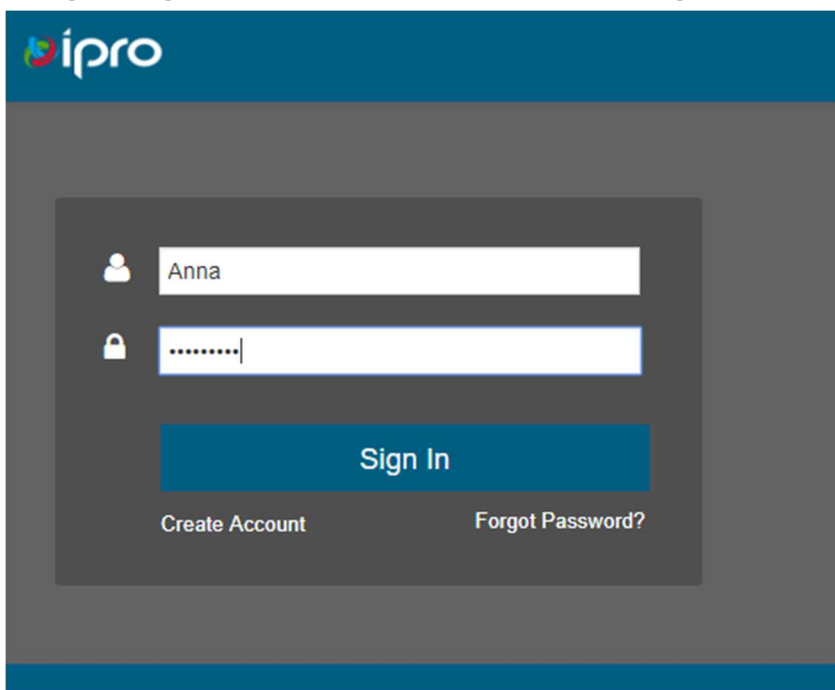
FAQ's

Quick Start Guide

We Are Here to Help!

1. Log in to the TrialDirector 360 Website

1. Click on the link in the email to access the TrialDirector 360 website.
2. Using the log in credentials supplied in the email, log in to the website.



The screenshot shows the login interface for the TrialDirector 360 website. At the top, there is a dark blue header with the 'ipro' logo. Below this, the main content area is a light grey rectangle. Inside this rectangle is a white box containing the login form. The form consists of two input fields: the first one contains the text 'Anna' and is preceded by a user icon; the second one is masked with dots and is preceded by a lock icon. Below these fields is a prominent blue button labeled 'Sign In'. At the bottom of the white box, there are two links: 'Create Account' on the left and 'Forgot Password?' on the right.

Before you can install TrialDirector 360 on your local machine, you must first activate your TrialDirector 360 account.

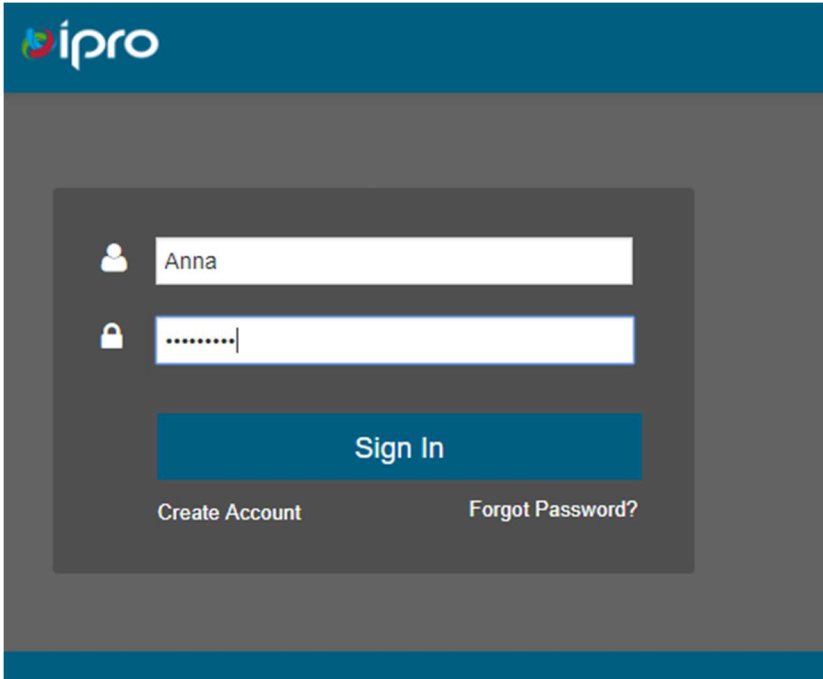


Note: Activating your account is easy. You just login, go to your account page, and accept the End User License Agreement. This process is explained below.

2. Activate Your Account

To activate your TrialDirector 360 account:

1. Log in to the TrialDirector 360 website.



2. The first time you log in to the website, the system will prompt you to read and sign the End User License Agreement. The End User License Agreement (EULA) wizard displays.



3. Read the EULA and, when finished, click the **Accept** button.



4. Update the password for your account and click **Next**.

The screenshot shows the "ACTIVATION" wizard at step 2. A progress bar at the top has three circles; the first two are dark blue and the third is light gray. Below the progress bar, the text "CHANGE PASSWORD" is displayed in green. There are two input fields: "New Password" and "Confirm Password". A blue "Next" button with a right arrow is located in the bottom right corner.

5. The final page of the wizard confirms that your acceptance of the EULA has been recorded. Click the **Finish** button.

The screenshot shows the "ACTIVATION" wizard at step 3. The progress bar at the top now has all three circles filled with dark blue. Below the progress bar, the text "THANK YOU FOR COMPLETING YOUR ACTIVATION!" is displayed in green. A blue "Finish" button with a white checkmark icon is located in the bottom right corner.

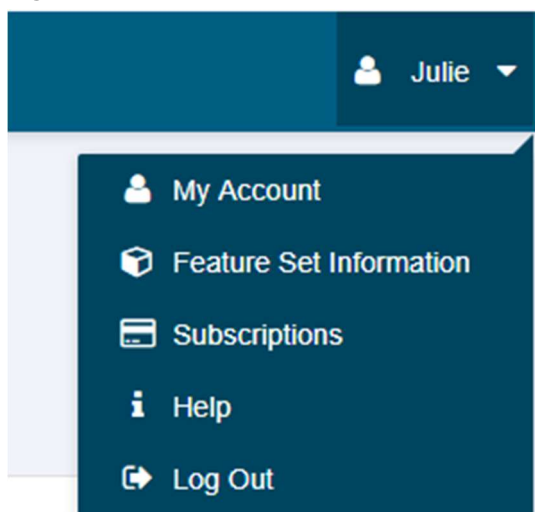
3. Download the TrialDirector 360 Client

To download the TrialDirector 360 client, follow the steps below:



Note: These steps assume that you have activated your TrialDirector 360 account following the instructions in the "2. Activate Your Account" on page 7 section. It also assumes that you are logged in to the TrialDirector 360 website.

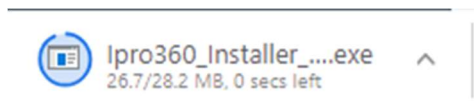
1. When you log in to the TrialDirector 360 website, the Case Manager page displays. In the top, right corner of the page, click on the dropdown arrow next to your account name. Then click the **My Account** option.



2. The **My Account** page displays. In the top right corner of the page, click the **Download Clients** button.



The TrialDirector 360 install package downloads to your local machine.



Note: If the installation package does not automatically download, turn off the pop-up blocker for your browser for the TrialDirector 360 website.

4. Install TrialDirector 360 Client



Minimum System Requirements are as follows:

- OS - Microsoft Windows 10 64-bit
- CPU - Quad-Core Processor
- System RA - 8 GB
- Disk space - 256 GB
- Graphics card - 1 GB dedicated memory

You cannot install TrialDirector 360 on a Oracle VM VirtualBox.

To install the TrialDirector 360 client:

1. After the TrialDirector 360 installation package is finished downloading, locate the TrialDirector 360 installation page and double click on the file.

The TrialDirector 360 Installation wizard displays.

Welcome to Ipro 360®

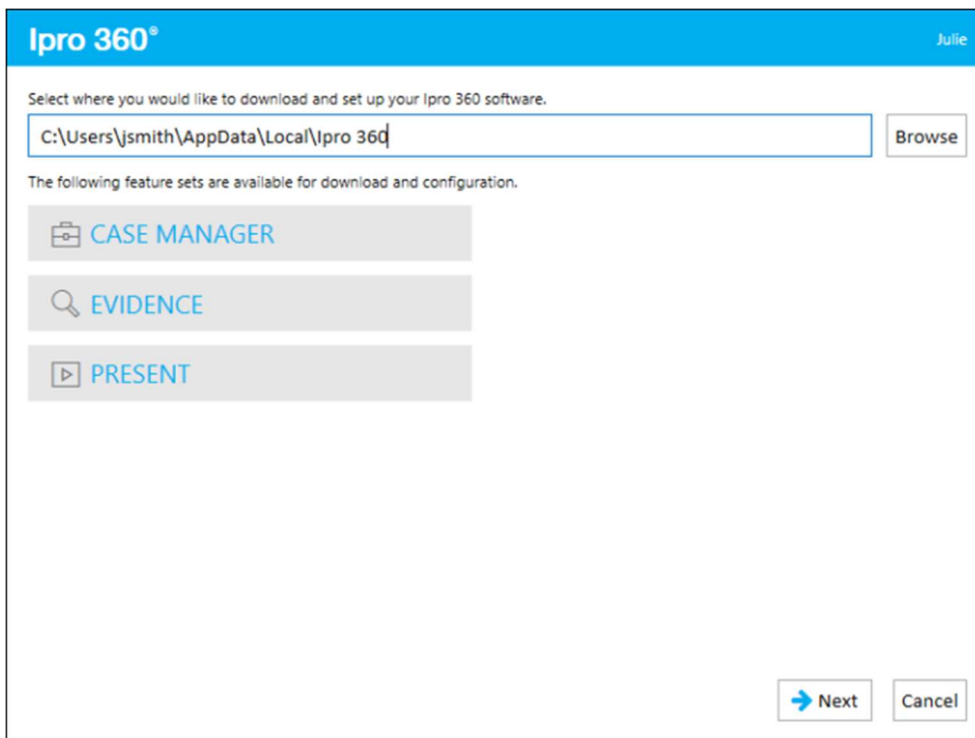
Sign in to install your Ipro 360 desktop client.

Username
Julie

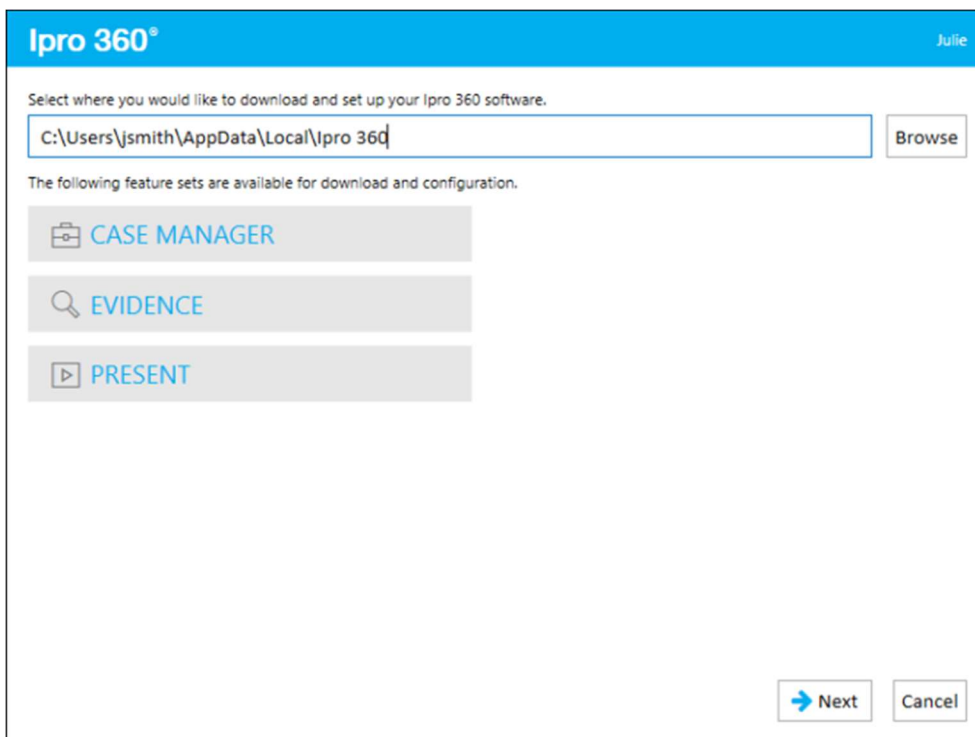
Password
●●●●●●●●

Sign In Cancel

2. On the **Welcome** step, use the user name sent to you via email and the password you specified in the previous procedure, to sign in to your account.



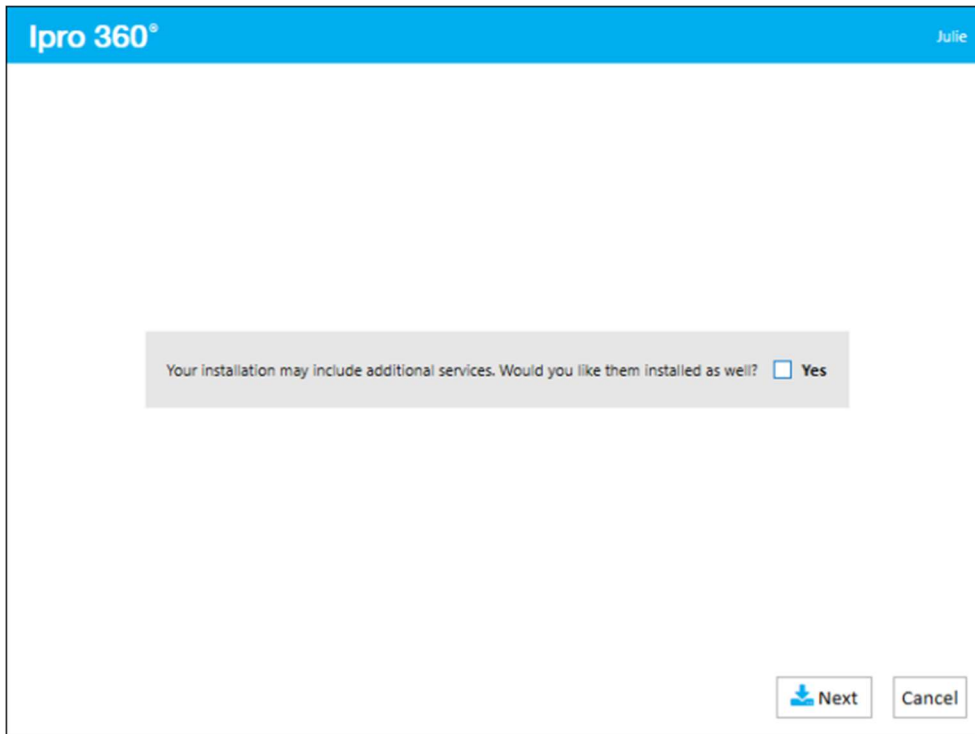
3. Browse to the file location on your computer where you would like to store the TrialDirector 360 files.



A list of the feature sets activated on your account appears below the file path.

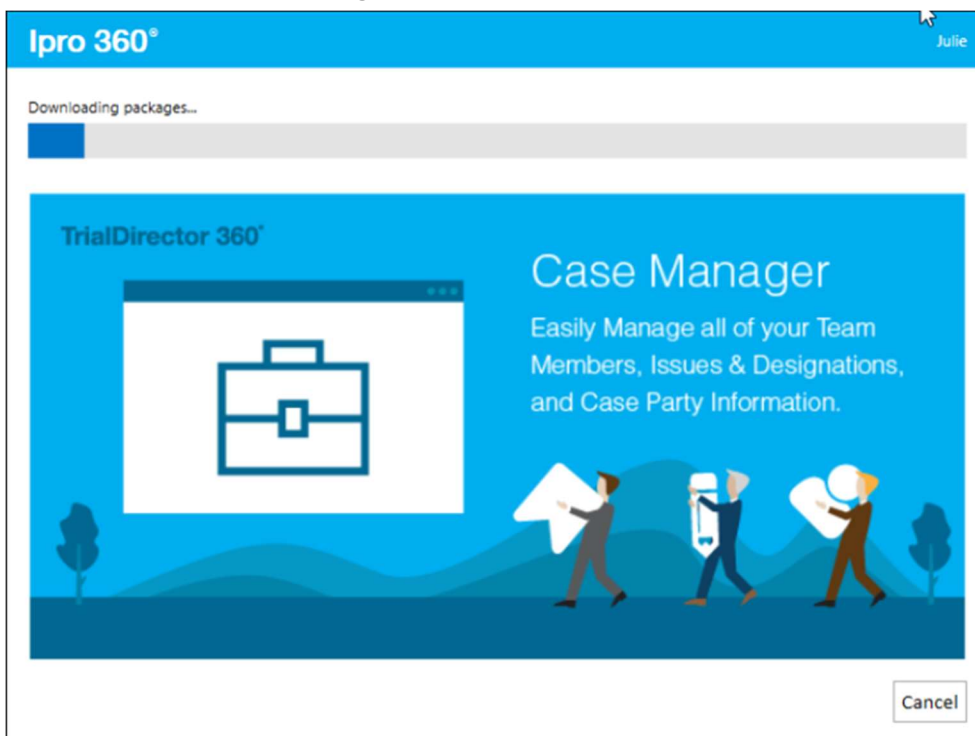
4. Click **Next**.

- On the next page of the wizard, a prompt appears, asking if you would like to install additional services. Skip this prompt. Do not check the box.



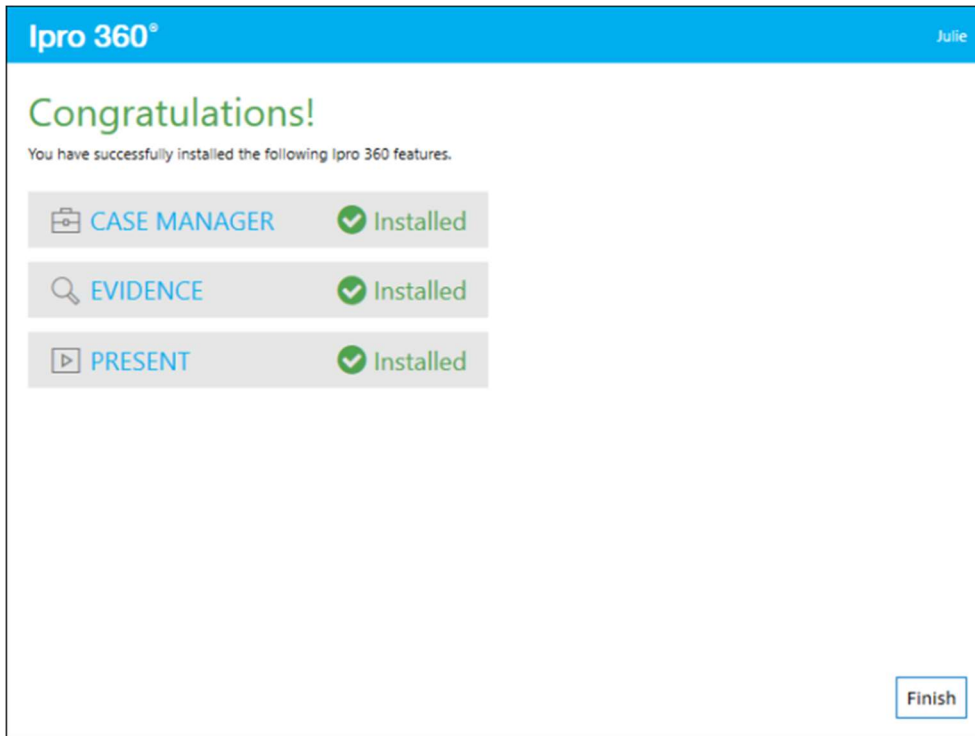
- Click **Next**.

The installation process begins.



Wait for the TrialDirector 360 installation process to complete.

7. When the install completes, the congratulations window appears and shows you the feature sets that were installed with TrialDirector 360.



8. Click **Finish**.

